Creating a Ledger Record Sample and Scenarios

1. Click on **Spending & Collections** and then **Create Ledger Record**.

2. Create a Ledger item for a print job to cost $100.00 <u>estimated</u>. To ensure the Ledger is entered as estimated, in the Transaction Status field, click the down arrow for the available options.

3. All fields with asterisk must have entries. When you have finished entering your data, click on the **Save** button at the bottom of the page.
Note: Four of the six strategic elements are not operational as of yet.

4. You should now be at the View Ledger Records page. Click on the **New** button to create a new ledger. Now create a Travel document as <u>Planned</u> for $6,000.00. The process is the same as it when you created the ledger for the print job. The only difference, besides the amount, is the Transaction Status. When you are finished, click on the **Save** button.

5. Now, create a ledger for yourself that is for training. The SF-182 has been sent to Minneapolis for $5,000.

6. From the View Ledger Records page, click on the **New** button and enter the necessary data. Given that the SF-182 has been sent to Minneapolis, go to the **Transaction Status** field and select <u>Committed</u>. When you have finished entering all necessary information, click the **Save** button at the end of the form.